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Maryland
Department of Economic & Employment Development

LABOR MARKET DIMENSIONS

A Monthly Report on the Dynamics of the Labor Market in Maryland

November, 1990

Maryland Department of Economic and Employment Development
Office of Labor Market Analysis and Information
1100 North Eutaw Street
Baltimore, Maryland 21201

William Donald Schaefer, Governor
J. Randall Evans, Secretary

LABOR MARKET DIMENSIONS
NOVEMBER, 1990

MARYLAND

After months of apparent stability, the movement in November's labor force statistics provided the first clear indication that the slowing in the national economy is impacting upon Maryland's economic performance. For the first time in nearly three years, Maryland's jobless rate topped the 5.0 percent mark, rising from 4.5 percent in October to 5.3 percent in November.

In reaction to the gulf crisis, radical jumps in oil prices and significantly reduced consumer spending, national unemployment also climbed from 5.4 percent to 5.8 percent.

With November's upswing, the gap between statewide and national unemployment narrowed to just 0.5 percentage points.

Normally, the hiring of temporary workers for the holiday season tends to offset any seasonal employment declines which may occur. This year, however, wavering market conditions contributed to a relatively large decline in employment. During November, employment declined by 49,360 persons, from 2,415,622 to 2,366,262. While nearly two-thirds of this decline was absorbed by the withdrawal of workers from the job market, the remaining employment loss was reflected in unemployment.

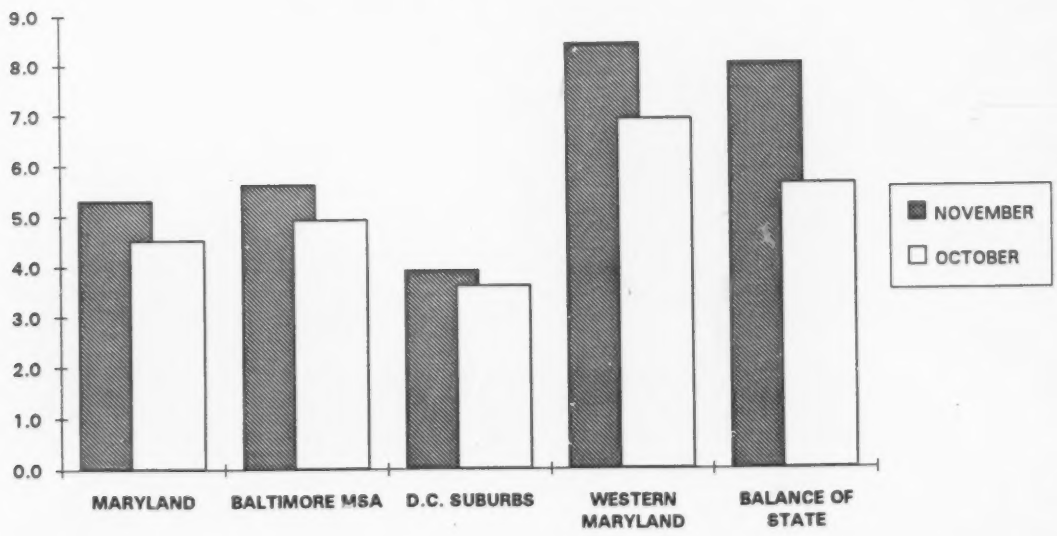
	November 1990	October 1990	November 1989
Civilian Labor Force	2,497,829	2,529,486	2,533,602
Total Employment	2,366,262	2,415,622	2,451,836
Total Unemployment	131,567	113,864	81,766
Unemployment Rate	5.3	4.5	3.2
National Civilian Unemployment Rate	5.8	5.4	5.2

The deterioration in the job market is particularly evident when making over-the-year comparisons. Since last year, statewide employment has declined by more than 85,500 persons while unemployment has risen by 49,801.

TOTAL UNEMPLOYMENT - MARYLAND AND REGIONS

Region	November 1990		October 1990	
	Number	Rate	Number	Rate
Maryland	131,567	5.3	113,864	4.5
Baltimore Metropolitan Area	67,012	5.6	58,859	4.9
Maryland's D.C. Suburbs	38,906	3.9	35,723	3.6
Western Maryland	8,820	8.4	7,353	6.9
Balance of State	16,829	8.0	11,931	5.6

UNEMPLOYMENT RATES--NOVEMBER 1990



INDUSTRY DEVELOPMENTS

Activity on Maryland's industrial payrolls was influenced by a combination of both seasonal and economic factors. Overall, total employment did rise by about 7,200 jobs.

The overall outlook in goods-producing industries during November was dampened by performance in the construction industry where the normal round of seasonal furloughs was magnified by the continuing slowdown in residential and commercial building activity. A net loss of 2,400 jobs during November lowered employment in this industry line to 164,700. Since last November, the construction industry has lost an estimated 1,900 jobs. Meanwhile, employment in the manufacturing sector rose by about 200 jobs. While seasonal layoffs were recorded in food processing industries, these layoffs were moderated by recall activity in transportation equipment.

Countering the movement in the goods-producing division, employment in the state's service-producing industries rose over the month. The overall increase, however, was well below the typical monthly gain, reflecting a slower pace of activity in several industry sectors. The gain in employment was clearly dominated by the seasonal increase in part-time openings in retail trade, particularly in general merchandise and apparel stores. Normal hiring patterns were tempered, however, by national trends which reported a decline in retail sales activity during November. Increases in retail trade, coupled with gains in trucking, health services, local government, and educational services, helped to counter seasonal and business-related layoffs in amusements, hotels, agriculture, and business services.

The hours worked by production workers in Maryland's manufacturing industries dropped slightly from 41.2 to 41.1. Although hours were reduced, workers earned slightly higher paychecks in November due to an increase in average hourly earnings from $11.70 to $11.79. Within the durable goods component, working an average of 41.9 hours per week yielded a paycheck of $519.98 in November, up from $518.67 in October. The shortest workweek in durable goods was reported in transportation equipment. Overtime reductions in this industry caused weekly earnings to drop by $6.33 to $617.40 in November. In blast furnaces, on the other hand, a slight increase in overtime, accompanied by a raise in hourly pay rates, resulted in higher weekly paychecks.

In nondurable goods, a slightly reduced workweek failed to impact upon weekly paychecks because of a hike in hourly rates. During November, workers in nondurables earned $451.76 for a 40.3 hour workweek compared to $449.25 for 40.4 hours in October. In both the textile mill and paper products industries, shortened workweeks reduced weekly paychecks during November. In the remaining nondurable industries, weekly paychecks rose in response to increased work schedules.

In the Baltimore Metropolitan Area, unlike in the state, the manufacturing workweek was extended by 0.2 of an hour to 41.4 hours in November. On average, workers earned $12.23 per hour, up from $12.12. In durable goods, fewer overtime hours were worked whereas, in nondurables, the workweek was lengthened by almost a full hour. Declining overtime lowered wages in durable goods by slightly more than $1.00 to $535.25 in November. In nondurables, on the other hand, weekly wages rose from $460.81 to $476.01.

MARYLAND
NONAGRICULTURAL PAYROLL EMPLOYMENT* BY INDUSTRY
BY PLACE OF EMPLOYMENT
(IN THOUSANDS)
NOVEMBER 1990

Major Industry Group	November 1990	October 1990	November 1989
Total Nonagricultural Employment	2,187.6	2,180.4	2,178.7
Goods Producing	369.3	371.5	376.9
Mining	1.7	1.7	1.7
Construction	164.7	167.1	166.6
Manufacturing	202.9	202.7	208.6
Durable Goods	104.8	104.0	109.6
Nondurable Goods	98.1	98.7	99.0
Service Producing	1,818.3	1,808.9	1,801.8
Transportation & Public Utilities	103.7	102.8	102.8
Trade	549.9	542.4	548.7
Wholesale Trade	114.2	113.9	114.0
Retail Trade	435.7	428.5	434.7
Finance, Insurance, & Real Estate	132.9	132.2	132.0
Services	605.0	605.3	596.6
Total Government	426.8	426.2	421.7
Federal	135.6	136.1	134.3
State	98.9	99.0	98.0
Local	192.3	191.1	189.4

* The count is of jobs, not workers. It includes full and part-time wage earners employed during pay period including the 12th of the month.

NOTE: Figures may not add to totals due to rounding.

Current data preliminary; previous month revised.

Additional industry detail available upon request.

Prepared in conjunction with the U.S. Department of Labor, Bureau of Labor Statistics.

HOURS AND EARNINGS OF PRODUCTION WORKERS IN SELECTED MANUFACTURING INDUSTRIES
NOVEMBER 1990

Major Industry Grouping	AVERAGE WEEKLY HOURS		AVERAGE WEEKLY EARNINGS		AVERAGE HOURLY EARNINGS	
	Nov.1990	Oct.1990	Nov.1990	Oct.1990	Nov.1990	Oct.1990
MARYLAND						
Manufacturing	41.1	41.2	$484.57	$482.04	$11.79	$11.70
Durable Goods	41.9	42.1	519.98	518.67	12.41	12.32
Lumber and Wood Products	39.9	39.4	361.10	352.63	9.05	8.95
Stone, Clay & Glass Products	43.8	44.0	508.96	503.36	11.62	11.44
Primary Metal Industries	43.6	43.6	686.70	680.60	15.75	15.61
Blast Furnaces	44.0	43.9	696.96	689.23	15.84	15.70
Fabricated Metals	40.3	40.6	421.14	419.80	10.45	10.34
Industrial Machinery	41.3	41.0	506.34	506.76	12.26	12.36
Electronic Equipment	45.8	45.8	432.35	433.73	9.44	9.47
Transportation Equipment	39.2	40.9	617.40	623.73	15.75	15.25
Instruments and Related Products	41.9	42.2	574.03	584.47	13.70	13.85
Miscellaneous Manufacturing Indus.	40.6	40.2	381.64	381.90	9.40	9.50
Nondurable Goods	40.3	40.4	451.76	449.25	11.21	11.12
Food and Kindred Products	41.2	41.1	427.66	417.17	10.38	10.15
Textile Mill, Apparel	35.4	36.2	274.70	280.55	7.76	7.75
Paper and Allied Products	43.0	44.3	516.00	544.89	12.00	12.30
Printing and Publishing	37.7	37.4	497.64	489.94	13.20	13.10
Chemicals and Allied Products	43.5	43.4	562.02	557.69	12.92	12.85
Rubber and Plastic Products	43.2	43.0	425.52	419.25	9.85	9.75
BALTIMORE METROPOLITAN AREA						
Manufacturing	41.4	41.2	$506.32	$499.34	$12.23	$12.12
Durable Goods	41.3	41.8	535.25	536.29	12.96	12.83
Nondurable Goods	41.5	40.6	476.01	460.81	11.47	11.35

REGIONAL ECONOMICS

BALTIMORE METROPOLITAN AREA

Labor force patterns in the Baltimore Metropolitan Area were similar to those statewide in that employment declines created a scenario of rising joblessness throughout the region. For the area as a whole, unemployment rose from 4.9 percent to 5.6 percent, a full two percentage points above last November's estimate of 3.6 percent. In Baltimore City, layoffs were commonly reported in construction, finance, and federal government, causing unemployment to escalate from 7.5 percent to 8.2 percent. Meanwhile, in Baltimore and Harford counties, reduced business activity in manufacturing and construction in particular, fueled jobless increases, prompting unemployment rates to rise to 4.9 percent and 5.5 percent, respectively.

MARYLAND D.C. AREA SUBURBS

In Maryland's D.C. suburbs, unemployment advanced to 3.9 percent in November, up from October's rate of 3.6 percent. Even with this increase, unemployment in the suburban area remained the lowest in the state. The largest increase locally occurred in Frederick County where the addition of nearly 900 workers to the unemployment tally pushed the jobless rate up by 1.2 percentage points to 6.0 percent in November. Within the county, a number of temporary layoffs were reported in the manufacturing industry. A slowdown in the county's construction activity was also noted over the month. Elsewhere in the region, Calvert County also experienced a relatively large increase from 4.4 percent to 5.3 percent, making unemployment in the county the second highest in the region.

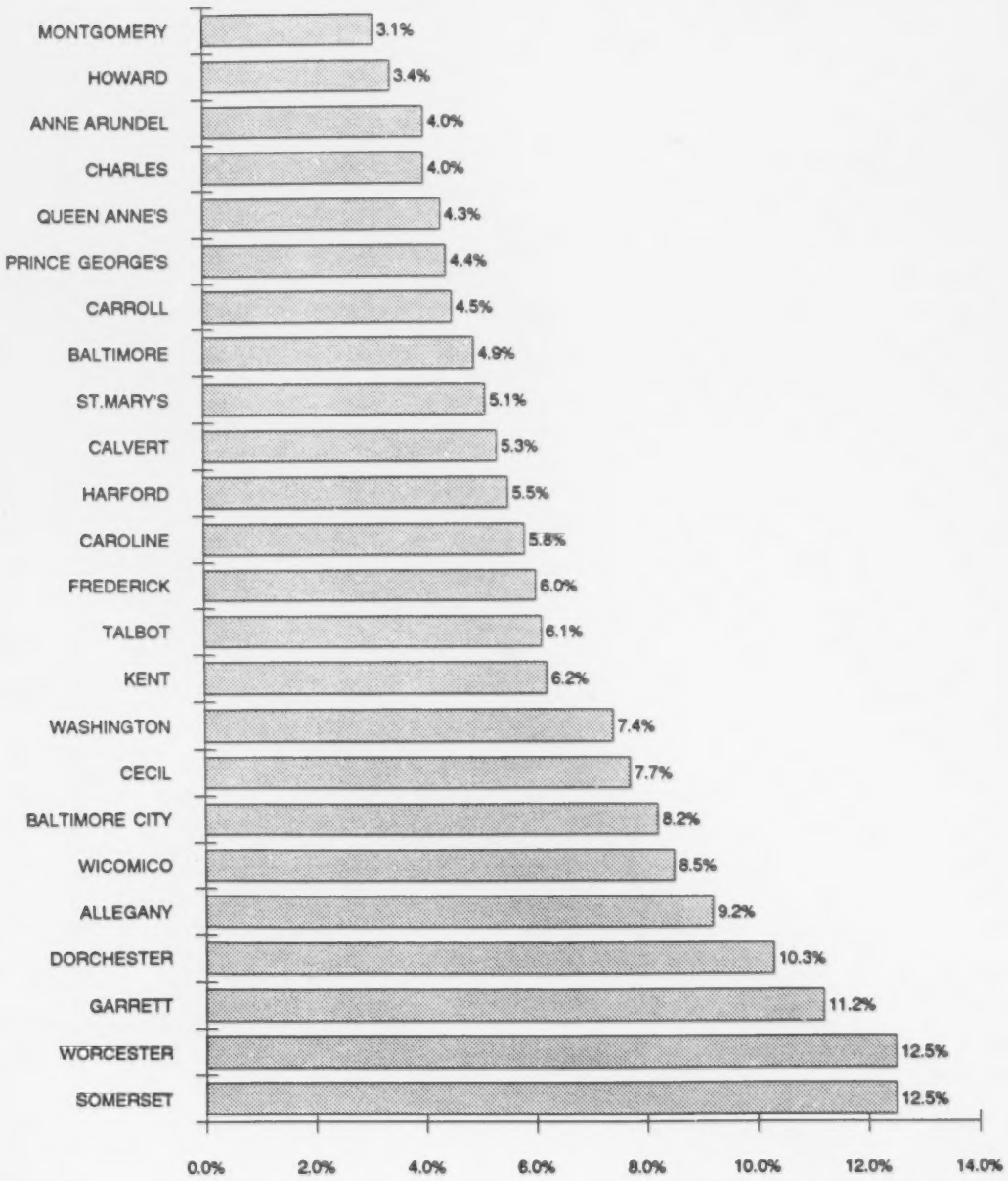
WESTERN MARYLAND

In Western Maryland, the softening in the employment situation resulted in the addition of about 1,500 workers to the jobless count, producing an unemployment rate of 8.4 percent in November. While it is not unusual for the region's jobless rate to rise during November, this is the largest over-the-month increase on record. Regionally, the largest job losses occurred in the construction industry. While unemployment rose in all of the western counties, the large increase, from 7.8 percent to 11.2 percent, was recorded in Garrett County. The employment setback in Garrett was exaggerated by an increase of nearly 175 people in the county's labor force.

BALANCE OF STATE

Joblessness in the Eastern Shore and Southern Maryland region rose to 8.0 percent in November, up from 5.6 percent. Unemployment expanded noticeably in Dorchester, Somerset, and Worcester counties. In Dorchester, cutbacks in manufacturing placed an additional burden on unemployment rolls, causing joblessness to rise to 10.3 percent. Meanwhile, in Somerset, the seasonal downswing in agriculture, seafood, and food processing contributed to increased joblessness and, in Worcester, continued layoffs in tourism-related industries pushed unemployment up to double-digits.

LOCAL UNEMPLOYMENT RATES-NOVEMBER 1990



NONAGRICULTURAL PAYROLL EMPLOYMENT* BY INDUSTRY - BY PLACE OF EMPLOYMENT
(in thousands)
BY REGION--NOVEMBER 1990

Major Industry Grouping	BALTIMORE METROPOLITAN AREA		MARYLAND PORTION D.C. SUBURBS		WESTERN MARYLAND		BALANCE OF STATE	
	Nov.1990	Oct.1990	Nov.1990	Oct.1990	Nov.1990	Oct.1990	Nov.1990	Oct.1990
Total Nonagricultural Employment	1,162.8	1,159.8	790.1	787.8	93.2	93.6	144.0	145.3
Goods Producing	203.5	204.9	106.4	108.7	23.2	23.5	34.8	35.0
Mining	0.3	0.3	0.5	0.5	0.7	0.7	0.2	0.2
Construction	76.8	78.0	68.8	71.1	6.6	7.0	10.3	10.4
Manufacturing	126.4	126.6	37.1	37.1	15.9	15.8	24.3	24.4
Durable Goods	69.9	69.6	18.8	18.7	7.2	7.3	9.3	9.3
Nondurable Goods	56.5	57.0	18.3	18.4	8.7	8.5	15.0	15.1
Service Producing	959.3	954.9	683.7	679.1	70.0	70.1	109.2	110.3
Transportation & Public Utilities	57.7	57.6	33.5	32.9	5.3	5.3	8.0	8.0
Trade	284.1	280.1	203.5	200.2	26.0	25.7	37.1	37.6
Wholesale Trade	67.7	67.7	35.8	35.5	4.5	4.4	6.1	6.1
Retail Trade	216.4	212.4	167.7	164.7	21.5	21.3	31.0	31.5
Finance, Insurance, & Real Estate	76.8	76.5	46.2	45.8	3.3	3.3	5.2	5.2
Services	324.6	324.5	229.0	228.7	20.1	20.4	32.0	32.7
Total Government	216.1	216.2	171.5	171.5	15.3	15.4	26.9	26.8
Federal	54.8	55.4	74.1	74.5	1.9	1.9	6.9	6.9
State	67.3	67.7	21.4	21.4	4.9	4.9	5.8	5.7
Local	94.0	93.1	76.0	75.6	8.5	8.6	14.2	14.2

*The count is of jobs, not workers. It includes full and part-time wage earners employed during pay period including the 12th of the month.

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Prepared in conjunction with the U.S. Department of Labor, Bureau of Labor Statistics.

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STATE OF MARYLAND
CIVILIAN LABOR FORCE, EMPLOYMENT, AND UNEMPLOYMENT
BY PLACE OF RESIDENCE

NOVEMBER 1990

AREA	CIVILIAN LABOR FORCE		EMPLOYMENT		UNEMPLOYMENT		UNEMPLOYMENT RATE		
	NOVEMBER	OCTOBER*	NOVEMBER	OCTOBER*	NOVEMBER	OCTOBER*	NOVEMBER	OCTOBER*	NOV. 1989
MARYLAND	2,497,829	2,529,486	2,366,262	2,415,622	131,567	113,864	5.3	4.5	3.2
BALTIMORE METROPOLITAN AREA	1,196,685	1,210,730	1,129,673	1,151,871	67,012	58,859	5.6	4.9	3.6
BALTIMORE CITY	341,470	345,431	313,394	319,552	28,076	25,879	8.2	7.5	5.8
ANNE ARUNDEL	212,638	215,441	204,064	208,074	8,574	7,367	4.0	3.4	2.3
BALTIMORE	388,089	392,876	368,917	376,167	19,172	16,709	4.9	4.3	3.2
CARROLL	62,709	63,108	59,873	61,049	2,836	2,059	4.5	3.3	1.9
HARFORD	83,015	83,482	78,467	80,009	4,548	3,473	5.5	4.2	3.4
HOWARD	92,976	94,530	89,854	91,620	3,122	2,910	3.4	3.1	1.9
QUEEN ANNE'S	15,788	15,863	15,104	15,401	684	462	4.3	2.9	2.6
D. C. AREA	985,203	999,792	946,297	964,069	38,906	35,723	3.9	3.6	2.3
CALVERT	23,211	23,427	21,973	22,386	1,238	1,041	5.3	4.4	2.6
CHARLES	46,944	47,508	45,082	45,928	1,862	1,580	4.0	3.3	2.1
FREDERICK	77,439	77,920	72,827	74,195	4,612	3,725	6.0	4.8	2.0
MONTGOMERY	421,577	428,430	408,564	416,237	13,013	12,193	3.1	2.8	1.9
PRINCE GEORGE'S	416,033	422,508	397,852	405,324	18,181	17,184	4.4	4.1	2.7
WESTERN MARYLAND	104,994	106,149	96,174	98,796	8,820	7,353	8.4	6.9	5.5
ALLEGANY	32,506	32,772	29,528	30,302	2,978	2,470	9.2	7.5	6.6
GARRETT	12,879	12,708	11,432	11,719	1,447	989	11.2	7.8	8.0
WASHINGTON	59,609	60,669	55,214	56,775	4,395	3,894	7.4	6.4	4.3
BALANCE OF STATE	210,947	212,816	194,118	200,885	16,829	11,931	8.0	5.6	4.6
CAROLINE	13,961	14,242	13,157	13,605	804	637	5.8	4.5	2.6
CECIL	35,313	35,828	32,578	33,673	2,735	2,155	7.7	6.0	5.1
DORCHESTER	18,340	18,177	16,458	17,069	1,882	1,108	10.3	6.1	5.5
KENT	9,440	9,698	8,855	9,198	585	500	6.2	5.2	3.4
ST. MARY'S	41,555	42,112	39,435	40,153	2,120	1,959	5.1	4.7	3.3
SOMERSET	13,010	12,917	11,390	11,902	1,620	1,015	12.5	7.9	7.9
TALBOT	17,951	18,132	16,863	17,227	1,088	905	6.1	5.0	3.1
WICOMICO	41,511	40,837	37,991	38,723	3,520	2,114	8.5	5.2	4.1
WORCESTER	19,866	20,873	17,391	19,335	2,475	1,538	12.5	7.4	8.2
UNITED STATES [1]	124,821,000	125,020,000	117,611,000	118,299,000	7,211,000	6,722,000	5.8	5.4	5.2

*Estimates for the state are revised.

[1] Source: U. S. Department of Labor, Bureau of Labor Statistics

NOTE: Figures may not add due to rounding. These are estimates relating to the week of the 12th of each month. The count is of persons not jobs. All data are not seasonally adjusted.

Maryland
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